Handling Duplicates in CCTO
COVID-19 Community Team Outreach

Review the process below for avoiding duplicates when entering contacts:

## Before Entering A Contact: Search by Key Information

Before entering a contact, you can review whether a monitoring event already exists by searching the "**All Contacts" View** by key pieces of information, such as:

- Last Name (and/or First Name)
- Phone Number
- Email Address
- Mailing Address

Open each result and check for matching information. **If there is enough matching information to determine that this is a duplicate of an existing monitoring event, proceed to the** Handling Multiple Exposures Job Aid **for next steps on updating an ongoing monitoring event or creating a new one (cloning) this contact.**
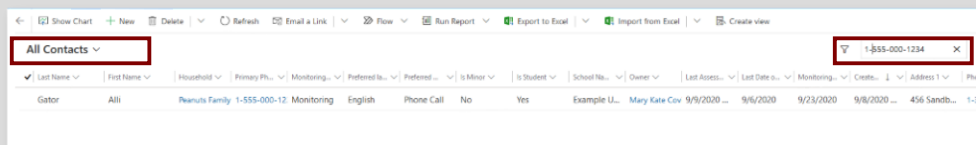
While Entering A Contact: Duplication Warning

If you attempt to save a contact that the system has identified as a potential duplicate, you will receive a **Duplicate Record Warning.** Follow the process below:

1. **Right-click** on each linked entry and select **"Open link in new tab"** (or click the entry while holding down the CTRL or CMD key on your keyboard).

2. **Review each profile** and determine if your contact:
   - Is a **duplicate of a contact who is currently being monitored in CCTO. ACTION: Proceed to step 3 and reach out to the contact owner if needed.**
   - Is a previously-monitored contact with a **deactivated profile(s). ACTION: Proceed to step 3.**
   - Is **a new individual who has never been monitored in the Tool. ACTION: Proceed to step 4.**

3. If your contact has an existing profile (active or inactive), **DO NOT SAVE,** and follow the steps outlined in the Handling Multiple Exposures Job Aid, **which describes the processes for active contacts (p. 1) and contacts with deactivated profiles (p. 2).**

4. **If your contact is a new individual who has never been monitored in CCTO**, you can click "Ignore and Save."

1	**"Open link in new tab"**
2	**Review each profile**
3	*Handling Multiple Exposures Job Aid*
4	**"Ignore and Save"**

DO NOT DEACTIVATE OTHER USERS' CONTACTS:

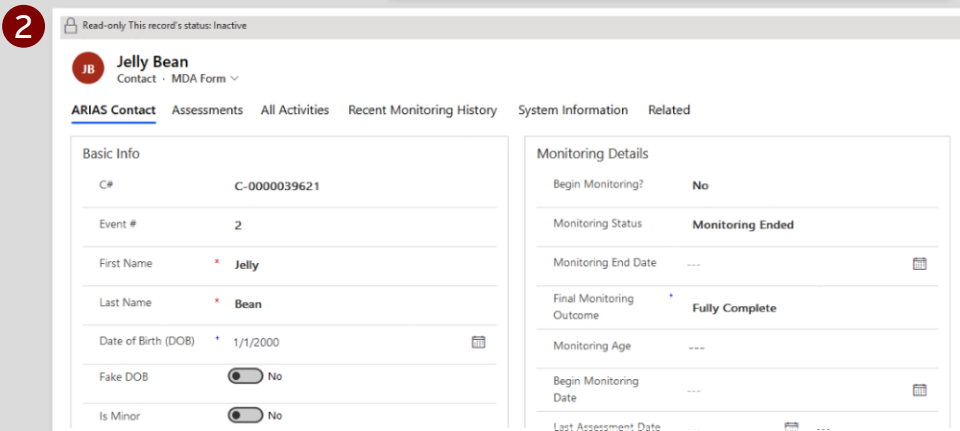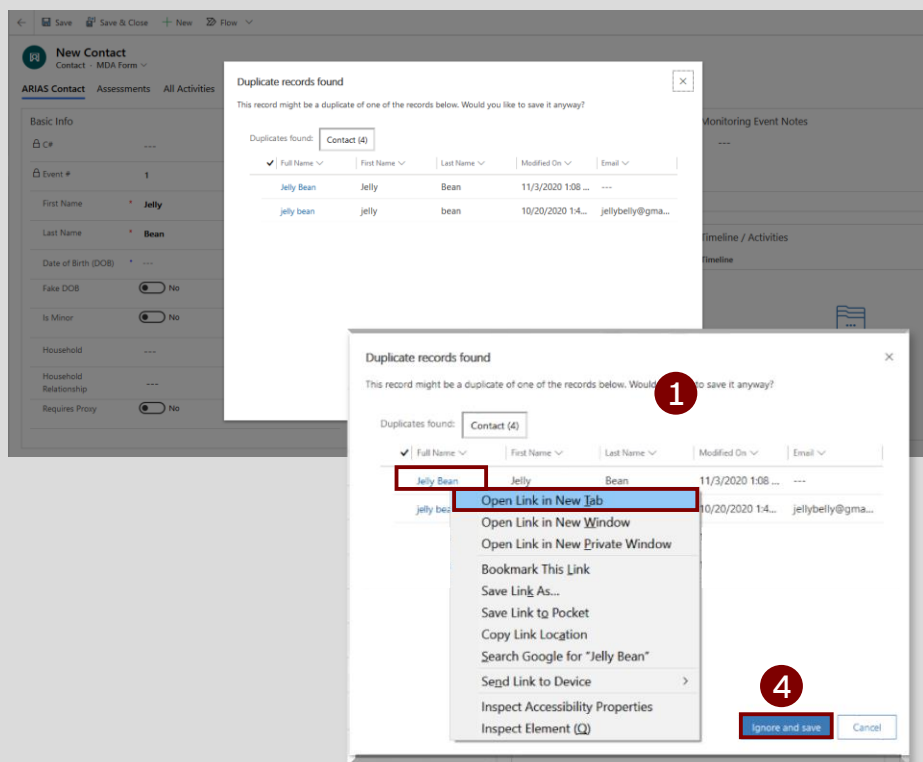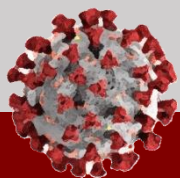**When handling duplicates, remember that you should NEVER deactivate another user's contact. If the contact you believe to be a duplicate is not your own, reach out to the contact's owner to determine how to proceed.**

Review the process below if you come across an existing duplicate in CCTO:

Discovering A Duplicate in CCTO

As a contact tracer, you may also come across a duplicate warning on an existing contact. If you receive a **Duplicate Record Warning** or otherwise encounter a possible duplicate, **please check with your supervisor on local protocol.** In general, you may follow the process below:

1. **Right-click** on each linked entry and select **"Open link in new tab"** (or click the entry while holding down the CTRL or CMD key on your keyboard).

2. **Review each profile** and determine if your contact:

   - Is a **duplicate of an existing contact who is currently being monitored. ACTION: Proceed to step 3.**

   - Is a previously-monitored contact with a **deactivated profile under a different C#. ACTION: Do not proceed to step 3.** Make a note in Timeline/Activities that this contact has had a previous monitoring event under a different C# and include the C#. Continue monitoring this individual.

   - Is not a duplicate and is **a new individual who has never been monitored in the Tool. ACTION: Do not proceed to step 3.** Continue monitoring this individual.

3. If your contact is a duplicate of a contact who is actively being monitored, determine which profile contains the **most complete and current information. Review the contact's profile, Timeline/Activities, and Assessments. You may also need to reach out to the owner of the other contact to determine how to proceed.** The most complete and current contact profile will become the profile to continue monitoring.

4. Make a note **on both contact profiles** indicating **all the C#s of duplicates. This will allow for additional review of duplicate profiles.**

1	**"Open link in new tab"**
2	**Review each profile**
3	**Determine profile to be kept**
4	**Make notes of C#s**

DO NOT DEACTIVATE OTHER USERS' CONTACTS:

When handling duplicates, **remember that you should NEVER deactivate another user's contact.** If the contact you believe to be a duplicate is not your own, reach out to the contact's owner to determine how to proceed.
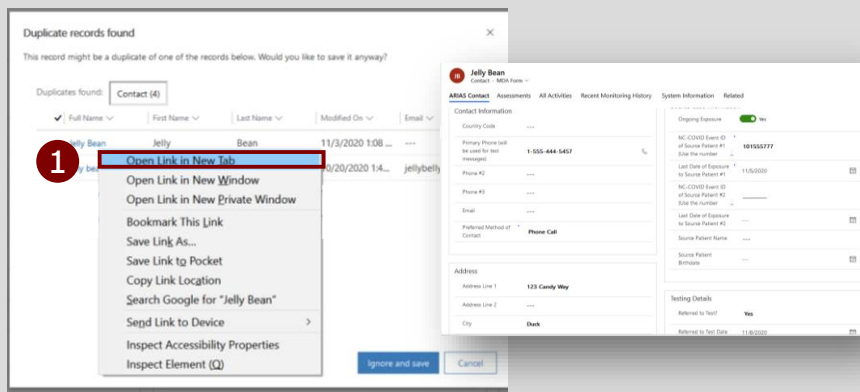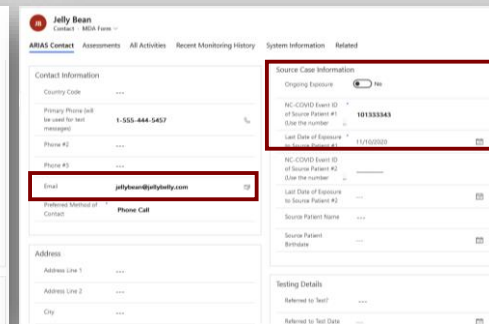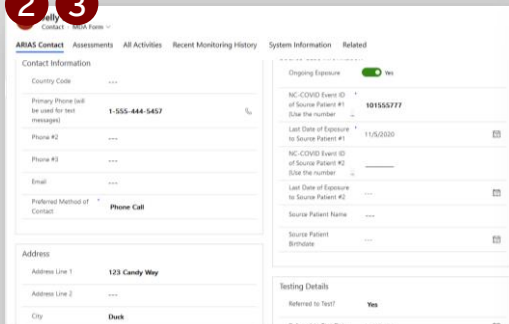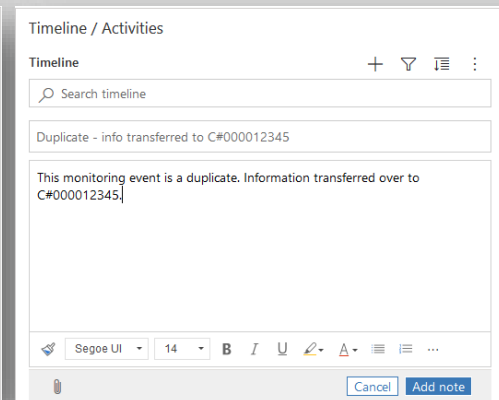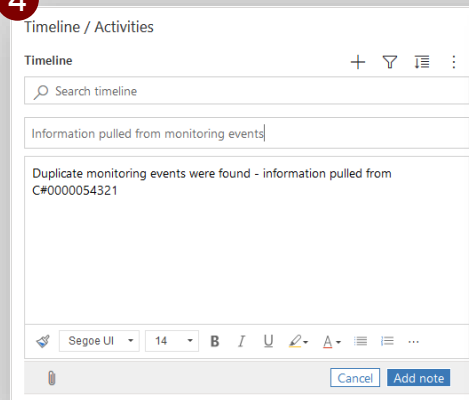

Profile to be kept

Duplicate profile (contains an email address and exposure that are missing from profile to be kept)

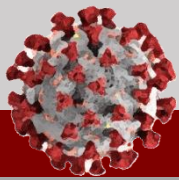**Review the process below if you come across an existing duplicate in CCTO:**

5. Transfer **as much information as possible** from the duplicate profile(s) onto the profile to be kept. This includes adding contact info (including NC-COVID Event #s of Source Patients), making a note of any symptoms or resource needs identified through assessments, and writing a synopsis of any key info from Timeline/Activities.

The remaining steps only apply to duplicate profiles that you believe should not be kept. Per local protocol, these profiles will be evaluated by a specific team of people to be assessed and/or deleted. You should not delete any contacts unless explicitly instructed to do so. Remember that you should never deactivate another user's contact and that should reach out to the other user if you believe their contact is a duplicate.

6. For any duplicate profiles, **ensure that "Begin Monitoring?" is set to "No" and "Monitoring Status" is set to "Monitoring Ended."**

7. Set "Final Monitoring Outcome" **on any duplicate profiles to "Is Duplicate."**

8. **If the duplicate profiles are your own, you may be able to deactivate** them in alignment with your local protocol. If the duplicates belong to another user, contact the user and determine how best to proceed. Notify your supervisor to ensure you are following local protocol. **DO NOT delete any contact profiles.**

9. Continue with monitoring as normal on the kept profile.

5	**Transfer information**
6	**End monitoring**
7	**"Is Duplicate"**
8	**Deactivate**
9	*Continue monitoring*

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Transferring info onto profile to be kept

Closing and deactivating duplicate profile